

# College of Education & Human Ecology

Campbell Hall Service Center

Your Fiscal & Procurement Staff

Mark Irvine  
Lindsey Ranly

# Why?

- Provide a higher level of service to YOU
- Align with President Gee's goals
  - > streamlining & eliminating bureaucracy
  - > commitment to excellence
  - > collaborating as one university (college)
- Ensure consistency of interpretation, application and compliance with policies and procedures

# How?

- ◉ Simplifying processes, make your life easier
- ◉ More highly skilled staff “trained experts”
- ◉ Staff focused on financial activity only (no longer a generalist who may also provide other services)

# What's the Impact to YOU?

- One-stop office full-service fiscal and procurement office
- 24/7 access to track the status of your procurement or travel request on-line, via web-based system (eRequest).

# Who is there to help you?

- ◉ Mark Irvine [mirvine@ehe.osu.edu](mailto:mirvine@ehe.osu.edu)
  - > Fiscal Officer – approves expenditures, provides financial management support, budgets, forecasts
  - > 247-8956
- ◉ Lindsay Ranly [lrarly@ehe.osu.edu](mailto:lrarly@ehe.osu.edu)
  - > Fiscal Associate – front line support, initiates orders, tracks orders, resolves problems, releases pcard
  - > 292-4485

# What can the service center help you with immediately?

## Lindsay

- Travel requests & reimbursement
- Purchases of any sort
- Reimbursements
- Deposits of check & cash collected
- Initiating payments

## Mark

- Budgets
- Financial reporting
- Contracts
- MOU/MOA development
- Accessing funds

# How do I place an order?

- Use eRequest – *“the next best thing to sliced bread”*
  - > Quick, easy to use & available 24/7 to make your needs procurement/travel needs known
  - > Document handling system to secure the front-end approvals
  - > Transmits your needs to service center which then processes it using most efficient means possible (pcard, internal order, purchase order)
  - > You can log in at any time to see progress of your order

[www.eRequest.osu.edu](http://www.eRequest.osu.edu)

# Using eRequest

# Getting Started

- Prior to using eRequest, you need to add the website as a “TRUSTED SITE” with Internet Explorer
- On the IE toolbar select, tools, Internet options, security, trusted sites and type in [https://\\*ketera.com](https://*ketera.com) then press “add”  
<https://erequest.osu.edu> then press “add”  
Press “close” (if you would like help with this call Lindsay Ranly at 2-4485)

# Getting Started

- To access eRequest, go to:

<https://erequest.osu.edu/>

- To login, enter your OSU Internet username (Name.#) and password  
Same as your CARMEN log-on

# Entering an eRequest

1. **Click New** to create a new request
2. Your contact info will default
3. **Select options** (buy something, pay someone)
4. Provide as much info as you would like

# Entering an eRequest

- ◎ **Need to use a specific vendor ? Not a problem...**
  - > just check the “Do Not Substitute Vendor box” (the fine print... some univ rules apply)
- ◎ **Other information to share (e.g., quote)**
  - > Just attach the document to the eRequest (quote, invoice, etc...)

# Entering an eRequest

- ◉ **Don't have time to finish the request? Just press "Save For Later"**
  - > (the request will not be submitted for approval)
- ◉ **Completed? Press "Continue"** (ready to submit for approval)
  - > **eRequest Preview** will display all of the information entered
  - > **Submit For Approval**

# Approvals – CHSC will secure

- Dr. Fox – business purpose & allocation of funds
- Mark Irvine – fund & policy restrictions
- OSP project approval from PI
  - > on exception basis via an email notification; in other words, the PI must notify the service center if he/she does NOT want to approve the expense

# Additional User Information

- ◉ Want to track the status of your request?
  - > Use **Search**
- ◉ Want to notify someone else of the order? (research asst wants to let the researcher know she has placed order)
  - > Use **Send Notification** free form field

# HOW ELSE CAN THE SERVICE CENTER BE OF HELP TO YOU?

QUESTIONS?

CONCERNS?